

B2B Channel Strategy

Principles, Catalogue, Access, and Roadmap

August 2019

B2B Channel Composition

Partner and supplier services focuses on digital interactions with trusted business partners who facilitated services to customers.



API (Gateway). Generic wholesale services available to a diverse developer partner eco-system to enable natural system usage.



Enterprise 2 Enterprise (1-1). The direct info sharing, supplier, and Govt agency, integrations to enable business processes.



Developer Experience. Resources that support our developer partner eco-system through the end to end lifecycle of API adoption and management.

PURPOSE

The primary purpose of this channel is to **enable business partners** to better serve their (and indirectly our) customers.

- ✓ Allows customers to better interact with Inland Revenue through their natural systems.
- ✓ X

PRINCIPLES



Wholesale. Expose coarse grained resources that do not assume how services will be orchestrated.



Generic. Should serve a broad range of needs, for a range of customers, across a range of tax types and products.

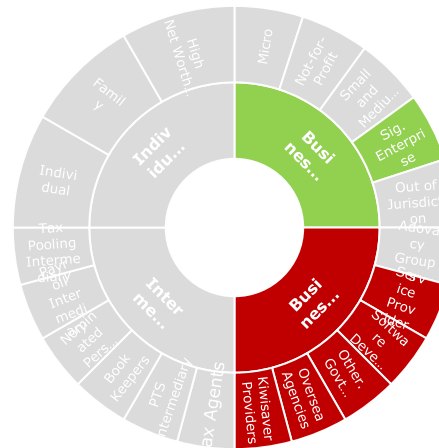


Enable Natural Use. Enable core functions to be integrated seamlessly into natural systems and processes.



Open. Open resources, and collaborative design with partners to develop services that are fit-for-purpose.

CUSTOMERS



B2B Channel Design Approach

Digital Customer Services

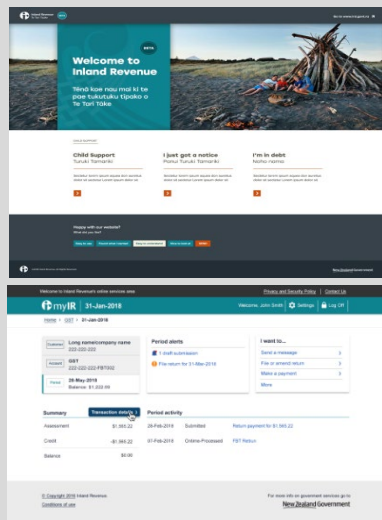
(B2C)

www.ird.govt.nz

Making the right content simple and easy to find

myIR

Putting services in the hands of our customers

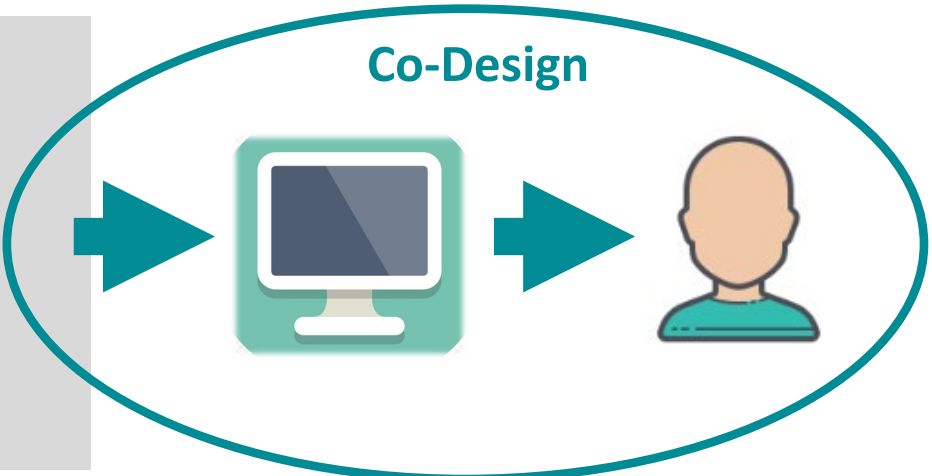


Digital Ecosystem Services

(B2B)

API Gateway

Integrate services into natural business systems



B2B Design Principles

Using natural systems

customers can fulfil the majority of their needs through their accounting/payroll/management/banking systems

Generic reusable services (apply to multiple use-cases and user-types)

don't create specific services for every need (standard services can be sequenced to achieve most outcomes)

Wholesale services for software

GWS are consumed by software, not customers, they should be wholesale resources that allow flexibility for software to orchestrate into services

Reducing manual work

for IR, intermediaries and customers

Customer self-service

build up over time to enable creation/management of most standard requests

Alignment with START and its capabilities

Channel consistency

consistent behaviour between myIR / Gateway Services / voice

Using appropriate channels

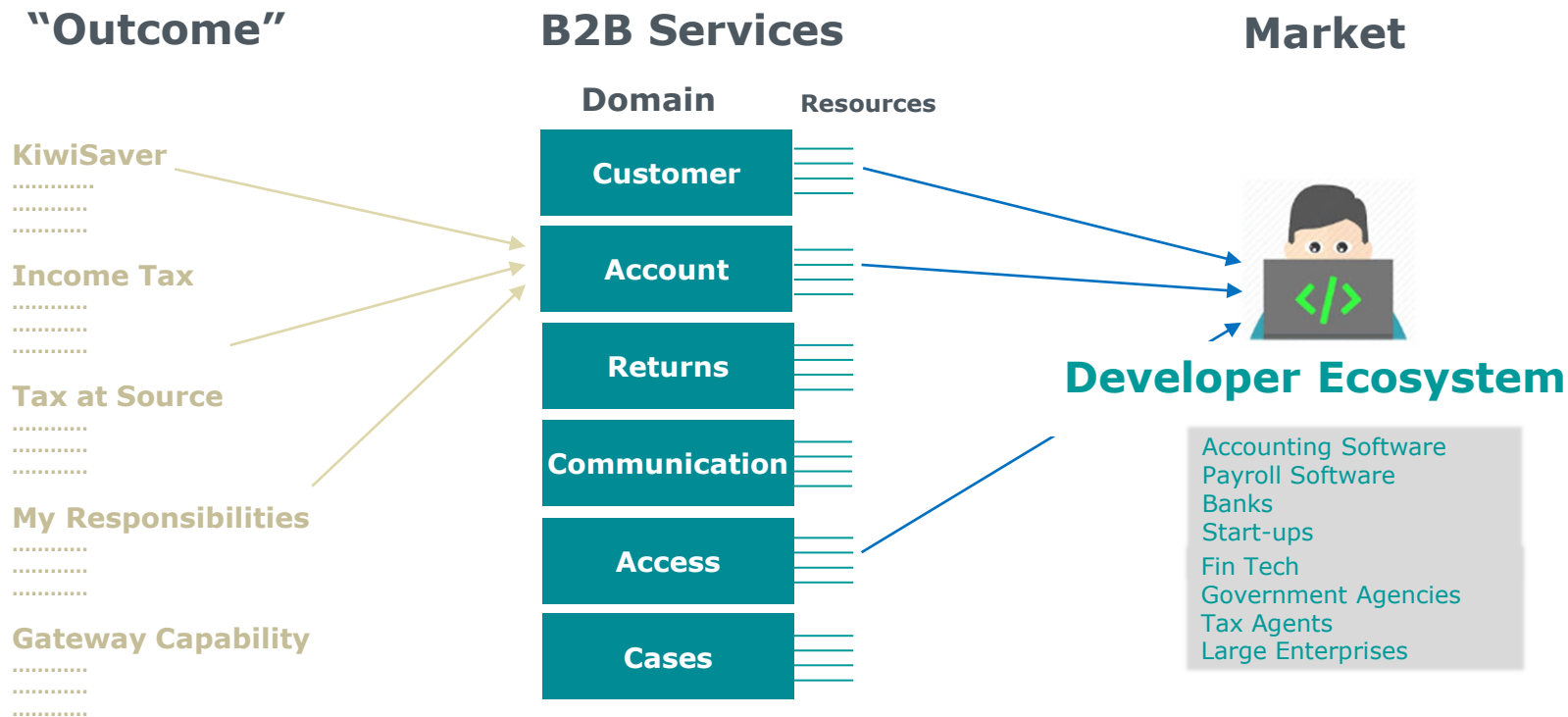
only use voice for tailored or complex scenarios

Usable for intermediaries and non-intermediaries

don't forget the direct consumer (not intermediary) user base!

Generic Services Catalogue

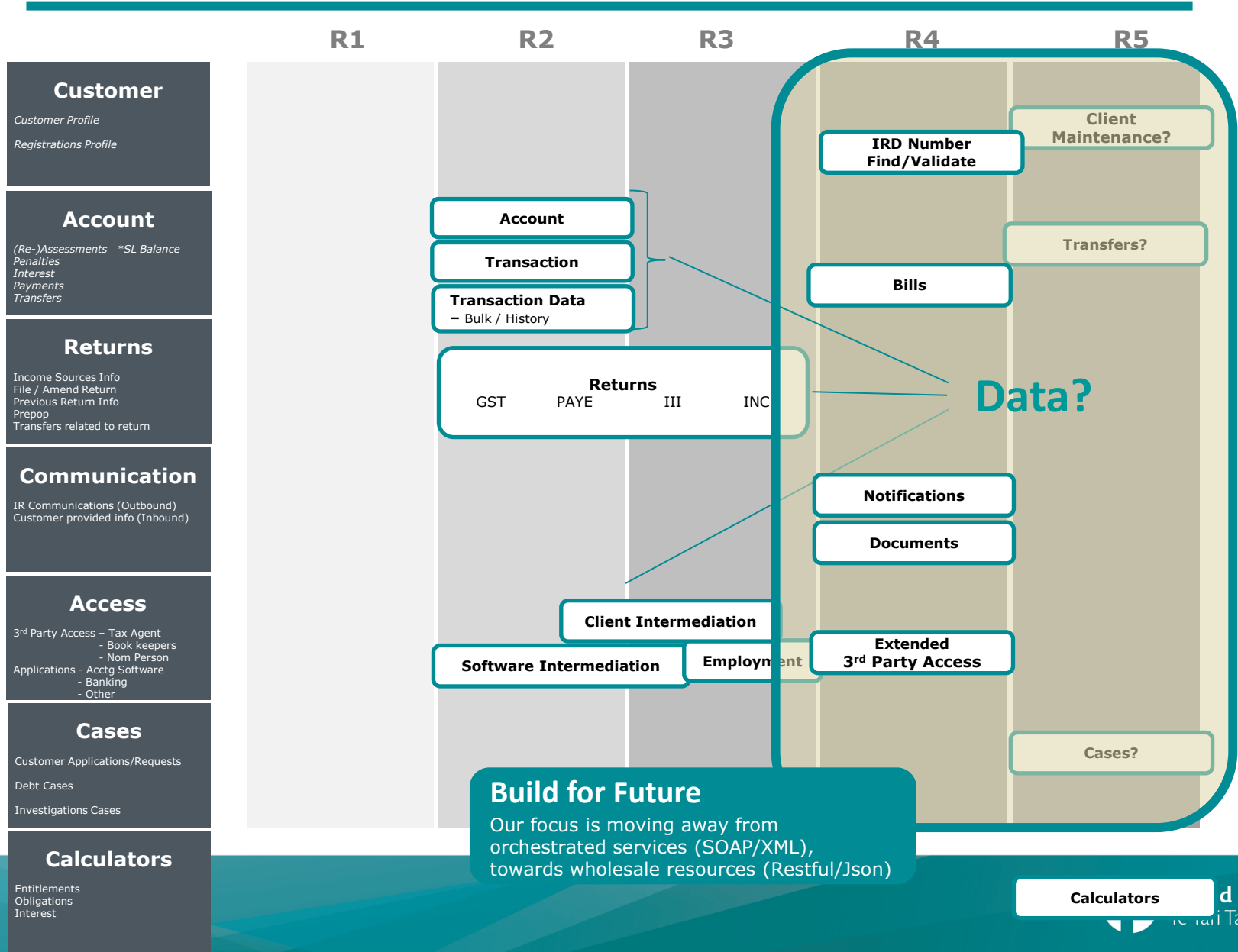
Generic services based around *functional domains* allow reuse of a single solution to solve *many outcomes*, extension of services over time, and enables our *developer ecosystem* to orchestrate resources in innovative ways into a broad range of services.



EXAMPLE: Account Service

1. **GENERIC SOLUTION = FUNCTIONAL DOMAIN**
Resources such as account balance, transactions, assessments, can be queried for a chosen tax type.
2. **REUSABLE = MANY SCOPE ITEMS DELIVERED VIA FEWER SERVICES**
 - Income Tax: Tax agents need provisional tax obligations and amount due
 - KiwiSaver: Scheme providers need details of contributions made
 - Student Loans: Expose loan balance
 - Individuals: Expose outstanding balances to improve payment accuracy
3. **EXTENDABLE = COULD BE EXTENDED TO FURTHER/NEW TAX TYPES, RESOURCES, AND FUNCTIONS**
4. **ENABLES INNOVATION = MULTIPLE DEVELOPERS COULD ORCHESTRATE IN DIFFERENT WAYS**
 - Bank uses outstanding balances for payment automation
 - FinTech aggregates financial position and cash flow for advice, including Student Loans and taxes due
 - Accounting software integrates to cashflow manager

Building base services



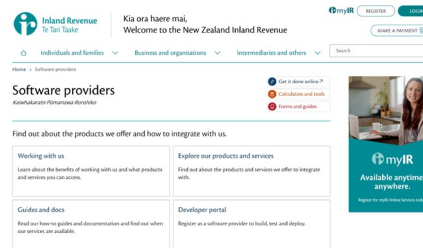
Developer Support Ecosystem

Specialised Team



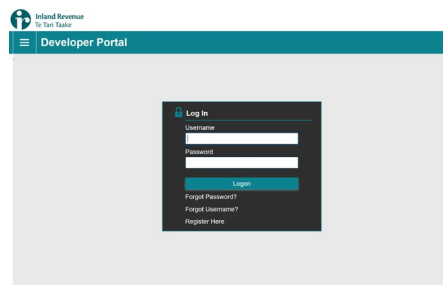
- Account Management
- Developer Experience Managers

Software Providers Site



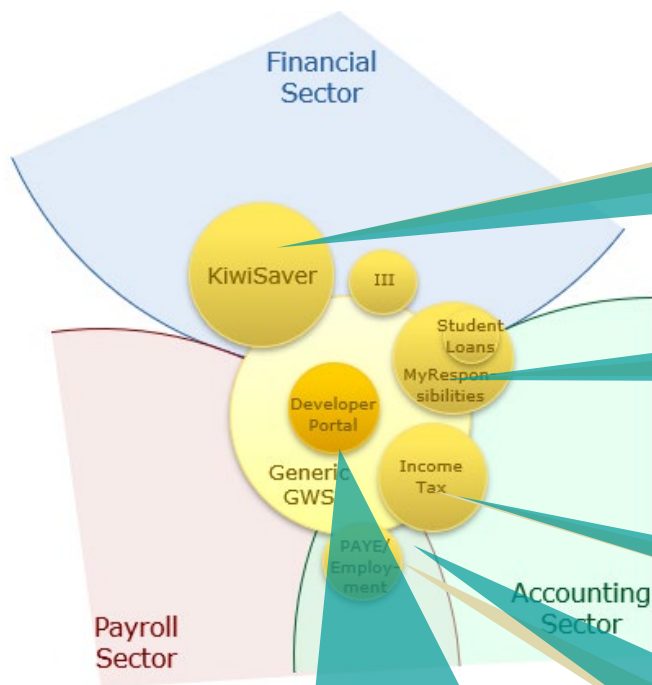
- IR Strategy & Roadmap
- Benefits of working with us
- Description Services
- Guides and Support

Developer Portal



- Registration & Onboarding
- API Catalogue & Documentation
- Access Environments & API Key Management
- Versioning & Lifecycle Management
- Interactive Backlog & Community Collaboration
- Knowledge Base & FAQ's
- Self-service Incident & Defects
- Analytics – Service status and usage

Design engagements for Release 4



KiwiSaver

- Been engaging since August 2018
- 5 workshops and 5 incubators
- KiwiSaver scheme providers, admins and software providers

MyResponsibilities

- i.e: payments / obligations
- 2 incubators so far and a couple of workshops coming up
- Software developers, fintech's, banks, payment intermediaries
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Income Tax

- Been engaging since December 2016
- 3 workshops and 4 incubators
- Current E-File user plus newer / smaller / innovative players

PAYE / Payday filing

- 2 incubators so far, with more planned
- Employers, payroll developers, payroll intermediaries

Developer Portal

- Lots of discussions as various partners onboard to existing services
- Engagement starts in August
- Players from all customer groups

Other Considerations

Delegated Access – 3rd Parties & Software

- A greater number of 3rd party organisations, and software applications, seek access to data/functions held by IR
- We currently accommodate delegated access to a small number of specific relationship (e.g. Tax Agent, Accounting Software)
- How do we develop an access model that allows for a wide variety of different relationship types, and access needs?

Partner Eco-System Governance

- We have a larger, and more diverse, number of software developer partners wanting access out services;
- How do we evolve our governance to manage various risks, including:
 - Use and protection of data;
 - Security expectations;
 - Services quality expectations;
 - Monitoring and logging expectations.